UCLA Health Ambulatory Practice Appointment Reminder Setup

Objective:

UCLA Health offers its patients and families the opportunity to receive reminders regarding their future appointments. Reminders are provided in various forms and are dependent on the patient's preference.

Types of UCLA Health Appointment Reminders:

- Clinic Appointment Reminder Print-Out
- Appointment Reminder Phone Call (Provided through ClientTell- West)
- Appointment Reminder Text Message (Provided through ClientTell- West)
- myUCLAhealth Appointment Reminder Message

To set up Appointment Reminder Services for your practice, please see the instructions below.

1. **In order to set up appointment reminder services, you will need to provide pertinent practice specifics. For example, if your practice requires specific testing for new patients, your clinic specifics would state "Please be sure to bring your outside scans and medical records for your visit."**
   a. In area "A", review the phone script template. The fields in **red** are pulled from CareConnect. However, the fields in **blue** require you to input information
   b. In area "B", please input the Pre-Appointment Arrival Time: The time the patient should arrive to avoid being late.
   c. In area "C" you will be required to provide clinic specifics. Please share information that may be pertinent for a patient visit to your practice (i.e., parking validation, required testing, etc.) These instructions will also be utilized for your clinic print out and myUCLAhealth appointment reminders.
   d. Area "D" is the appointment reminder text message template.
   e. In area "E" you will be required to provide the pre-arrival appointment time. This will be the same as the phone script.
   f. In area "F" please provide a truncated version of the phone clinic specifics. Please be advised, the ==character limit for text messages is 75.==

<table>
<tr><td colspan="3" align="center">Appointment Reminder Phone Template</td></tr>
<tr><td>A.</td><td colspan="2">Hello, this is a UCLA Health <Clinic Name> appointment reminder. Please confirm or cancel your appointment at the end of this message.

This is a reminder for <Patient Merge>. The appointment is scheduled for <Day & Date Merge> at <Time Merge> with <Doctor Merge> at <Address Merge>. Please arrive <>minutes early with your insurance card, picture ID and co-pay for check in.

[Please insert clinic specifics in this area]

Press 1 to confirm your appointment,
Press 5 To cancel your appointment,
Press 2 to repeat this message.</td></tr>
<tr><td>B.</td><td colspan="2">Pre-Appointment Arrival Time: New Patients: Return Patients:</td></tr>
<tr><td>C.</td><td colspan="2">Please provide clinic specifics: (This will also be included on the clinic appointment reminder print outs and myUCLAhealth Appointment Reminder Message)
(Example: Please leave time for traffic and parking)</td></tr>
<tr><td colspan="3" align="center">Appointment Reminder Text Message</td></tr>
<tr><td>D.</td><td colspan="2">UCLA Health Appt Reminder for <Pt. First Name>: <Clinic Name> on <Day> <Date> @ <Time>. TEL: <Clinic Phone> Reply OK to confirm, NO to cancel.

Confirmation Message: Check-in <XX> min prior to appt. w insurance, ID & co-pay. <Clinic Specifics> Msg&Data rates may apply</td></tr>
<tr><td>E.</td><td colspan="2">Pre-Appointment Arrival Time: New Patients: Return Patients:</td></tr>
<tr><td>F.</td><td colspan="2">Please provide clinic specifics <i>75 Character Limit</i>
(Example: Please leave time for traffic and parking)</td></tr>
</table>

2. **Once you have completed your practice specifics, please:**
    a. Contact ClientTell (West)
        i. ClientTell Representative: Janel Vander Zanden, Phone: 877.244.9178
    b. Enter a Service Now Ticket (See image below)
        i. Entering a service now ticket allows our ISS team to build the appointment reminder into the clinic print outs and myUCLAhealth Messages.
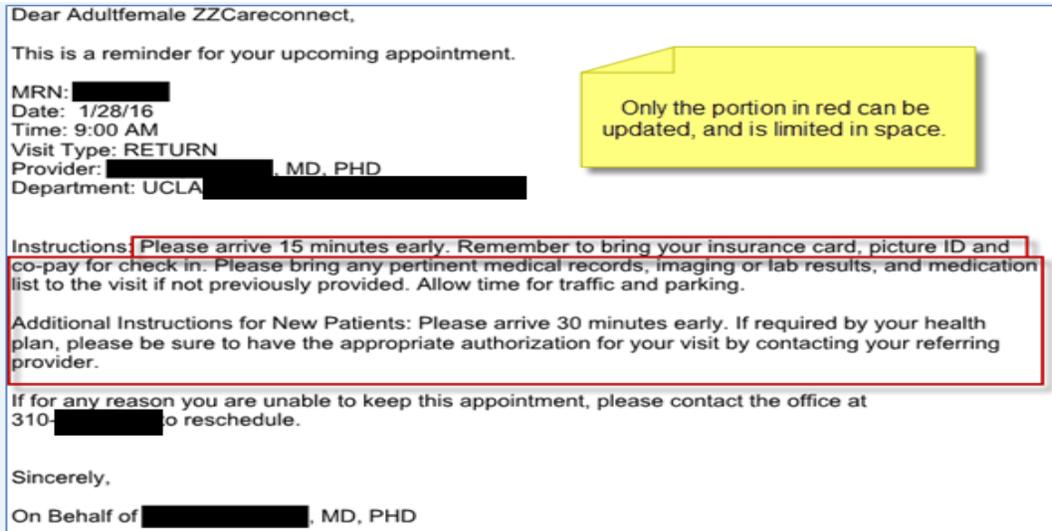
        ii. Contact Phone: 310.267.2273
        iii. Website: Service Now
        iv. In the "Short Description Field" Enter **"Appointment Reminder Setup"**
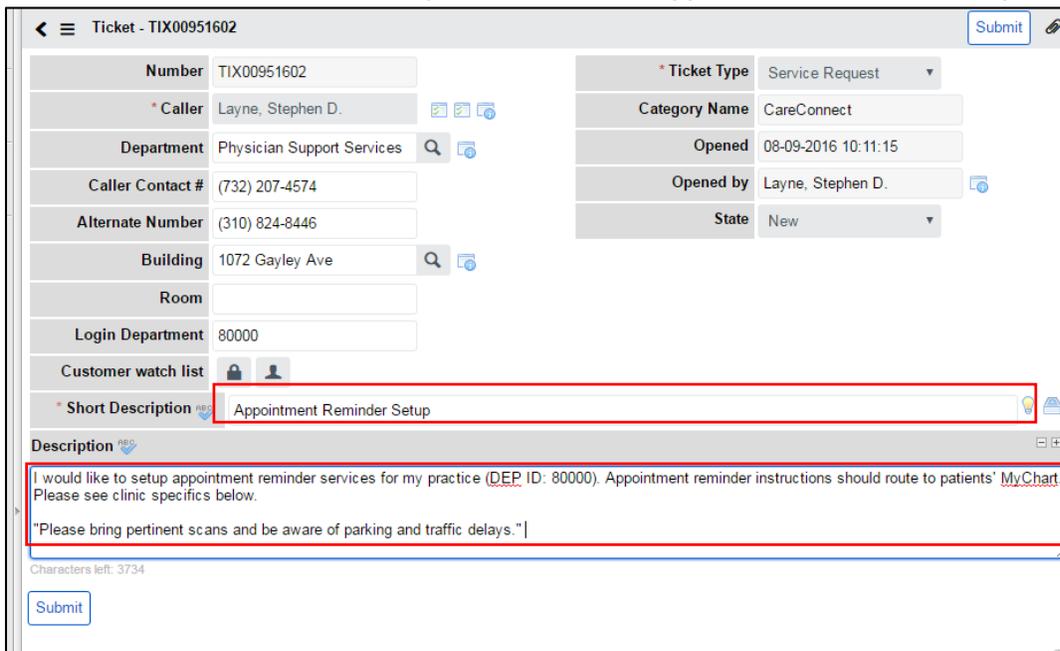
3. When you submit your request, please be sure to include:
    a. DEP IDs
    b. Clinic specifics
4. Please allow at least two weeks for Appointment Reminder setup. If you need to revise your appointment reminders, please be sure to contact both ClientTell (West) and ISS.
5. For further questions or concerns, please feel free to contact Stephen Layne at 310-824-8446.